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SUPERVISORY DEVELOPMENT THROUGH TRAINING

WALTER D. BONHAG

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THROUGH TRAINING

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Walter D. Bonhag

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by

Walter D. Bonhag
Lieutenant, United States Navy

Submitted in partial fulfillment of
the requirements for the degree of

MASTER OF SCIENCE
IN
MANAGEMENT

United States Naval Postgraduate School
Monterey, California

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ABSTRACT

Since World War II, the United States has enjoyed a steady rate of economic growth unprecedented in the history of the world. Concurrent with this growth has been a steady and continuing rate of technological, social, and economic change. The factors of growth and change have greatly affected the field of management for many new problems have arisen, as well as many new concepts in the management of an organization. Social scientists have contributed much to the understanding of group dynamics, communications, and leadership. Engineers and mathemeticians have provided "hardware" useful to the manager. The tools and concepts now available to management have placed the supervisor or middle manager in an increasingly important position in the organization. Likewise, the development of supervisors or middle managers increases in importance. One method of enhancing this development is through the establishment of a training program for supervisory personnel. The essential elements of such a program are described in a theoretical approach to training. This approach is then used to analyze the elements of training in two multi-million dollar corporations of a diverse nature. Basic training efforts for supervisory personnel at both corporations are described.

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1. Introduction.

This paper is primarily concerned with the development of supervisory personnel through training methods. The subject is of particular interest when one considers the position of supervisory personnel and their impact on every organization involved in the production of goods and services. The "supervisor", under some title or another, has a hand in almost every work activity conducted and is the individual that represents the "connecting link between the management and the workers".[1] In many instances and to many workers, the supervisor is the organization, and is the management. For it is this individual that represents the workers closest contact with management, and upon whom, to a very great extent, their well-being is dependent. To higher management, the supervisor represents the tie to the pulse of the organization, i.e., the worker. It is the supervisor that is responsible to management for the flow of material, the maintenance of discipline and morale, and with proper representation of management policy, procedures, and goals to the lower echelon. Thus, supervisory development is vital to a growing, active and successful organization.

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[1] R. O. Beckman, How to Train Supervisors (New York: Harper & Brothers Publishers, 1944), p.3.

Conversely, writers such as Drucker and Leavitt foresee a lessening of importance of middle management to the organization of the future.[2] Automation, taped machine processes, and electronic data processing methods have made inroads into the supervision of personnel for they have permitted a degree of control and rapid communication previously not available to top management. Further, high speed computer systems and operations analysis have provided top management a decision making tool that is capable of consuming more detail than heretofore possible. As a result, processes that by their very nature required a considerable amount of decentralization can now be programmed under the centralized control of higher management. Nevertheless, since these systems will permit a more direct line of control between top management and the operating level they will necessitate larger, more specialized staffs at the top which will in turn require a greater influx of personnel experienced in the problems and mechanics at lower echelons. Problems of manager development will remain.

There are many tools available to management to assist in supervisory development, i.e., performance appraisal, interviewing, selection techniques, career planning tech-

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[2]H. J. Leavitt and T. L. Whisler, "Management in the 1980's", Harvard Business Review, XXXVI, November-December 1958, pp. 41-48.

niques, and training, to name but a few. It is training which probably has the most influence of all the tools available, as training offers the greatest opportunity to mold or change behavior through effective utilization of the learning process. Considering that there are certain essential elements which affect the success or failure of training it was decided to develop a theoretical approach to supervisory training which embodies those essential elements. This was done through a review of the literature. Since much has already been written in this field, it was considered appropriate to undertake a study of the supervisory training efforts in two large and successful concerns in an attempt to learn what is being done and what can be done in this field. In connection with this, the paper will attempt to develop the needs and pressures that make supervisory training essential to the present day organization.

2. A Theoretical Approach to Supervisory Development through Training.

What pressures make supervisory development important? In the not too distant past a foreman or supervisor reached that position oftimes by virtue of bulk and ability with his fists or an axehandle. Today, it is highly unlikely that this type of individual would make the grade supervising a group of electronic technicians, factory workers, or even unskilled laborers. For today the supervisor is not only faced with pressure for production from his superiors, but with pressure from all sides. He may be required to interpret and take action in accordance with complicated governmental regulations. He must be equipped to properly handle pressures from union representatives and to cope with problems of workers that cannot be ignored because results may be increased absenteeism, high turnover, and low employee morale. In most cases, he must be competent technologically, able to advise management concerning technical processes or to assist a worker with a sophisticated, complex piece of machinery. He is a disciplinarian, a teacher, a father image, a lot of things to a lot of people.

Probably the major source of pressure on supervisory personnel is continuing social and economic change. Technological advances have contributed greatly to make ours

an increasingly complicated society. Since the turn of the century, the corporate form of business has increased in size and importance to where it now employs 60% of the workers, produces 75% of the goods and services, and pays three-fourths of the wages in this country.[1] Our Federal Government has increased in size to where it is now the largest "business" in the world, with federal expenditures accounting for 20% of the Gross National Product.[2] Labor unions have had a definite effect on change, with membership accounting for some 18 million workers of the 76 million presently employed.[3] Trends are toward increased recognition of social responsibility, as expressed in social security laws, workers compensation, unemployment insurance and in safety and health practices. Brand new vocations have come into being as a result of increased interest in human relations, industrial psychology, group dynamics, and employee relations. Business has become in-

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[1] Financing America's Future: Taxes, Economic Stability and Growth, a report prepared by the Committee on Federal Tax Policy (New York: Committee on Federal Tax Policy, 1963), p. 35.

[2] Ibid., p. 37.

[3] U.S. Bureau of the Census, Statistical Abstract of the United States: 1963, 84th edition (Washington, D.C., 1963), p. 250.

creasingly interested in its public image. With these changes there has become increased recognition of the need for new concepts of managerial work and leadership responsibility, with corresponding recognition of the need for a continuing education of managers and supervisory personnel. There is also a "recognition that managing is or should be considered to be a distinct and professional kind of work that has its foundations in basic social values and in an established body of knowledge and principles which can be taught and learned."[4] Thus, with increasing social and economic pressures, it becomes apparent that effective training and development of supervisory personnel must be a planned, orderly and continuing process to ensure organizational growth and security.

The preliminaries to supervisory training. In order to understand where an organization is going with its supervisory training, and in order to develop a training program that truly meets its needs, it becomes a necessity to make a study of what is required of supervisors and the organizational environment in which they must function. Several areas require consideration:

1. Supervisory activity - what the supervisor does

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[4]George C. Houston, Manager Development, Principles and Perspectives (Homewood, Illinois: Richard D. Irwin, Inc., 1961), p. 10.

and why he does it.

2. Supervisory responsibility - a determination of the lines of authority and responsibility and their effect on supervisory activity, as delineated in organizational policy and procedures.

3. Informal organization - a determination of the working relationships outside the formal organizational channels.

4. The supervisor as an individual - no two supervisors are alike in their needs, and not all will require the same amount or type of training to achieve the desired results.

5. Training climate - the support given to training efforts by management. "Management attitudes strongly affect the interest, motivation, and effort of the entire organization. They establish the 'climate' and determine whether or not it is one which is conducive to learning and growth."[5]

There are many tools available to assist management in the determination of supervisory training needs and the surrounding environment: attitude surveys, reviews of job descriptions, interviewing of seniors as well as possible

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[5] Ibid., p. 31

trainees, and performance appraisal reviews, among others. Once these determinations are made the setting of realistic goals for training becomes a matter of sorting out what is possible within the contraints that may be imposed by a budget, management's plans and policies, and the organizational goals and objectives. "Proper utilization of training in modern industry and business requires that it be put in its proper context. It is not an end in itself, but a means to an end."[6]

Attendant to the determination of need should be an understanding of contributions training can make towards desired supervisory development. By the same token, management should be made aware of the problems attached to the training situation in order to avoid the pitfall of expecting too much in the way of tangible results. There is a multitude of material that provides actual case studies and experimental data which, when carefully studied, will prove of great use in the development of a training program. There is no need for another organization's mistakes to be repeated, as long as the successes or failures have been documented and are readily available for study.

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[6]William McGehee and Paul W. Thayer, Training in Business and Industry (New York: John Wiley & Sons, Inc., 1961), p. 4.

The most important contributions that can be made in supervisory training are:

1. Human relations - training can offer the supervisor those fundamentals of understanding people, their frustrations and motivations, their needs and attitudes, and of influencing thought and behavior. These understandings should result in an increase in supervisory tolerance and sensitivity, with corresponding improvements in worker attitude. By understanding the human factors, the supervisor will be better equipped to understand himself and apply this knowledge to self-improvement as well as to his relationships with others. "By a greater awareness of people and their characteristics he can be more considerate in dealing with them, and the work group will become more effective."[7]

2. Technological change - our society as a whole is becoming better educated, with the technical workforce growing three times as fast as the total population.[8] Effective technical training will enhance creativity at the supervisory level, and supervisory confidence in himself, his workers, and the process with

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[7]Thomas W. Harrell, Industrial Psychology (New York: Holt, Rinehart and Winston, 1960), p. 149.

[8]Bernard J. Bienvenu, "What Kind of Training for Tomorrow?," Personnel, XXXVIII (December, 1961), p. 14.

which he is involved. Technical training will also prepare the supervisor to anticipate future technological change, thus helping to counteract a natural tendency towards complacency and the narrow outlook that present machinery or equipment is the ultimate.

3. The individual - increased knowledge of the skills required will increase confidence and contribute to improved decision making. It will help to create the psychological climate that orients supervisory attitude towards major organizational goals, as the individual should become better informed of the organization as a whole. An enlightened training program will enhance individual motivation to continue the learning process, as it helps to open new areas of interest, as well as improving promotion potential.

In view of the preceding, setting the stage for training adds up to considerable preparation. It is a difficult, time consuming, and costly process that would involve considerable effort on the part of management. Whether these preliminaries materially contribute to supervisory development through training can not be shown in studies or empirical data. However, the importance of determining the need and setting realistic goals for training cannot be discounted because of a lack of supporting material.

Developing the training program. It is not the intent of this paper to describe the teaching methods that are available to management. A cataloging of methods serves no useful purpose, and if desired, can be found in any library. The intent then, is to discuss those factors considered critical to successful results in training supervisory personnel.

A most effective base for any training program given under company auspices is a course that presents in broad terms the organization's objectives, history, policies, and procedures. This will serve to give the supervisor a more complete conception of his responsibilities and his place in the organization. It will better equip him to interpret future plans and policies, and will aid in identification of personal goals with the goals of the organization.

More than likely, any group of supervisors brought together for training will be of a diverse nature, with various backgrounds of experience, formal education, and mental capacity. Thus, it is important that course material be presented to strike the right level or balance to avoid boring the brighter trainees or escaping the duller ones. If the preliminary job has been done, management should know the supervisor better as an individual, and will have a better understanding for the problems confronting the

supervisor. The main thing is to ensure that material is so presented that everyone is confident of it being within his own capabilities to apply the new learning back on the job. To illustrate, teaching human relations by the use of academic terms and descriptions would probably not provide a supervisor with a basis for relating this material to the problems of worker behavior which face him daily. In short, to be effective it must be in his language.

When developing training courses designed to improve a supervisor's skill it must be realistically related to the needs of the job. In other words, it does little good to explain a process with which the supervisor will have little or no contact. Relating training to the job simplifies the problem of practicality and the development of skills which will have application on the job. A possible danger in too thorough a relation between training and job is that the training might become aimed at the short run problem or become enmeshed in detail.

Every effort should be made to design the training program in such a manner as to permit the maximum amount of participation from the supervisor. In this manner, he will have less of a feeling that the learning is being imposed on his thinking. He will be less likely to outwardly accept and inwardly reject ideas or concepts if permitted to actively engage in the solutions to problems faced in

the classroom. Learning through experiencing the conditions of the course material is more likely to have a lasting effect on the supervisor, he will be more willing to apply these new concepts or ideas on the job. There are problems with participative methods of training, however. If the group is too large, the participation may be dominated by one or two individuals at the expense of the more reticent trainees. Some training situations do not lend themselves to active participation, i.e., the use and application of safety features on an explosive device.

The proper selection of instructors has a great bearing on the reception to the course and the amount of knowledge imparted. Basically, the instructor should have a thorough knowledge of the topic, be familiar with the instruction techniques used, and have a desire to teach.[9] Supervisors will be more attentive to instructors that are recognized as expert in the field of instruction. If the instructor is from the hierarchy, supervisors are likely to be more responsive because of a feeling that management is truly interested in their development. Considerable attention should be given to the instructor's preparation for a course, "one thing is necessary for good instruction:

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[9]Willard E. Bennett, Manager Selection, Education and Training (New York: McGraw-Hill Book Company, Inc., 1959), p. 134.

preparation. It is essential for any presentation, whether participative or non-participative."[10] Management can do much to this end, in the provision of instruction guides, procurement of teaching aids, texts, and in the preparation of technical handouts. However, most of the responsibility for preparation rests with the instructor and he should be aware that success or failure of the training situation rests in large part on that preparation.

If the organization is of the size to support a staff concerned with the training function, then their activities should include:

1. A continuing study of organizational policy and procedure to aid line management in creating an atmosphere conductive to growth and development of the individual supervisor.

2. Provide competent counsel to those managers involved with the responsibility of subordinate supervisory development in the procurement and utilization of those training vehicles most suitable to need.

3. Development of administrative data useful to the training situation, and maintaining records or statistics used in determining training progress.

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[10] John H. Proctor and William M. Thornton, Training: A Handbook for Line Managers (New York: American Management Association, 1961), p. 110.

It follows then, that staff participation in the training program is important, but must be considered in the proper context, i.e., the role of the staff is secondary to that performed by line management. Beckman cites cases of several hundred firms that undertook successful training courses, only to drop them when line management lost touch with the program.[11]

Follow-up to training. The responsibility for supervisory development does not end with the establishment of a course of instruction. Top management should be quite interested in the results obtained, since training at any level is a costly affair. Management should also be concerned whether trained supervisors are actually putting their new knowledge to good use and whether supervisors are motivated to continue a program of self-development. Supervisors may be frustrated in trying to put recently learned techniques to use and some form of encouragement may be necessary to maintain morale and interest. Thus a follow-up program to formal training takes on important aspects. Although primarily the line manager's job, follow-up should be a joint effort between the line and staff. The training specialist will be involved in all future

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[11] R. O. Beckman, How to Train Supervisors (New York Harper & Brothers Publishers, 1944), p. 112.

training and will be desirous of feedback that may be useful in improving new courses. A follow-up program may be designed along the following lines:

1. A system of performance appraisal that not only feeds performance information upward, but downward to the individual supervisor. This provides material and incentive for a program of self-development.

2. Guided discussion periods wherein the supervisors are encouraged to discuss problems encountered since training, applications of techniques learned in training, and comments or recommendations for future training sessions. These periods provide opportunity for subjective measurement of training results. They should also serve to enhance the retention level of supervisors.

3. Regularily scheduled visits to other departments, governmental agencies, or other organizations of a similiar nature, will present opportunity for active interchange of ideas and reinforcement of learning.

4. Encouragement of participation in part-time educational sessions at the local college or university, and membership in trade associations or professional societies, acts as a valuable aid to maintaining interest. This also provides a steady influx of new ideas.

Those involved with an organization's training program should maintain an active interest in what is new in the

field. It may be necessary to provide refresher course of the type that will bring the supervisor up-to-date with the changing conditions in the field of interest. In short, management cannot develop a training program and then rest on their laurels, they must be responsive to change and in order to maintain a successful program it must reflect that change.

In summary. Pressures exist that make supervisory development a vital function in any "going concern". By and large, the supervisor cannot cope with his development alone, he must be aided and encouraged by the organization and its management. Through the establishment of a training program, management provides encouragement for supervisory development. However, this can not be a canned evolution, it is a process that proceeds in three distinct stages: preliminary, where management sets the stage by discerning the need and setting the goals for training; program, actual conduct of training, during which management has responsibility for presenting material at the proper level, relating training to job needs, and selection of instructors with ability to import the desired learning; and follow-up, where management has the responsibility for encouraging continued self-development.

3. The Bank of America and supervisory development.

Bank of America has long had a reputation for being an aggressive, active organization. A reputation that is well deserved, for in sixty years it has grown from a rather inconspicuous local firm with resources of $285,000, to the world's largest private bank with resources of $14.7 billion. The bank employs in excess of 28,000 persons in more than 800 branch offices in California. Projected plans are for the addition of some 30 to 35 new branches per year. A wholly-owned subsidiary, Bank of America-New York, (International), adds another 34 branches and offices to an already impressive total. An affiliate, Banca d'America e d' Italia has some 82 branch offices throughout Italy.[1] Thus the problem of first-line supervisory and management development at Bank of America takes on an international flavor.

This type of growth and expansion must be accompanied by a great increase in the problems of recruiting, selecting, and training of managerial personnel. A. P. Giannini, Bank of America's founder, foresaw some of these problems prior to his retirement as bank president in 1936. It was at that time that Mr. Giannini established a $950,000

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[1]Bank of America, Annual Report, 1963, (San Francisco), pp. 1-15.

trust fund specifically for use in the education of bank officers and in research. A like amount was added at the time of his death in 1949.[2] The money serves as a foundation for the bank's training activities which now involve a staff of 85 persons. In addition, some 400 management trainees are processed through various programs each year.[3] This group provides the nucleous of personnel to be selected for first-line supervisory billets and is recruited almost exclusively from the college campus. Training for management trainees is primarily on-the-job supplemented by in-house formal training sessions, and guided home study. Three programs are currently in use, the description of one is presented in table I. Upon satisfactory completion of the program in table I, the trainee would be assigned as an Assistant Trust Officer. Similiar programs are designed to prepare trainees for careers in commercial branch banking and international banking. During the training phase each student is assigned to a training officer who keeps informed of student progress through monthly visits, records of which are maintained on IBM cards and processed

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[2]Statement by Ralph E. Boynton, personal interview.

[3]Ibid.

TABLE I

TRUST TRAINING PROGRAM

Commercial Banking Indoctrination, Branch Assignment

4 Months

Electronic Accounting
Commercial and Savings
  Teller
General Ledger
Note Department
General Banking Operations
  Operations Officer
  Personnel Administration
Loan Platform
  Lending Functions
  Business Development
  New Accounts

Trust Basic Training

3 Months

Main Office Assignment
Trust Accounting
Real Estate
  Inspection
  Insurance
  Appraisal
  Sales
Securities
  Control
  Cage Operations
  Analysis
  Reviews
Taxes
Corporate Trusts
Reconveyances-
  Foreclosures

Trust Administration

17 Months

Assigned for position rotation in either of the two Trust Headquarters or in the District Trust Offices statewide as a Junior Administrator with authority to sign as Pro-Assistant Cashier.
ON-THE-JOB Training-Includes guided work involving the following:
  Private Trusts
  Probate Estates-Guardianships
  Testamentary Trusts
  Employe Benefit Trusts
  Street Bonds
  Subdivisions
  Oil Royalties
  Escrows
  New Business Development

electronically. In addition, examinations are given at regular intervals on material covered in the home study courses. Practical on-the-job training, such as that described in table I, has certain advantages in that it does build on the actual experiences of day-to-day operations, i.e., one learns by doing. It also provides a warm body to fill in where shortages of personnel may exist. A firm scheduling of the various stages of training, which is done at Bank of America, permits the trainee to attach goals and objectives to the training. This helps to maintain interest during the more mundane phases of the training cycle. Since on-the-job training is normally spread over a greater period of time than classroom training and usually involves interaction between just two people, the teacher and the trainee, there is greater opportunity for reinforcement of learning by reward or punishment. Additionally, it provides more chances for the trainee's response to the learning situation. Feedback of results is usually immediate, another factor to enhance learning. "A trainee demonstrates the acquisition of a skill by performing a skilled act."[4] Thus eliminating

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[4]William McGehee and Paul W. Thayer, Training in Business and Industry (New York: John Wiley & Sons, Inc., 1961), p. 133.

one of the limitations of the classroom teaching situation. In a decentralized operation, such as at Bank of America, there are inherent disadvantages to the on-the-job training method:

1. It is extremely difficult to standardize training, for the supervisor of each trainee will have different methods and techniques for attacking one problem. Firmly established policy and procedure from the upper echelon will help to alleviate this problem, but this has a tendency to remove one of the advantages of decentralization.

2. On-the-job training is a time consuming affair and there is no guarantee that the trainee will remain with the firm upon completion. At Bank of America the three programs available take from 12 to 24 months. A considerable investment in time, when one considers the possibility that this newly gained knowledge may be used in the employ of a competitor.

3. Success as a supervisor does not guarantee success as a teacher. The size of this operation (400 trainees per year) suggests that some trainees will be assigned to supervisors that are highly qualified bankers, but may lack the ability or desire to impart their knowledge to a trainee. Real or imagined, supervisors may look upon the trainee as a threat to their security, thus

the quality of learning will suffer.

4. Management trainees, like midshipmen, live in somewhat of a no-man's-land. They are neither officers nor employees. Uncertainty exists as to future assignments upon the completion of training. Example from material on the International Banking training program: "Location of assignment is based entirely on the Bank's needs."[5]

It seems a paradox to suggest improvements at Bank of America for success and Bank of America are terms that are almost synonymous. However, it is felt that improvements in the management trainee program could be made. First, the training department at Bank of America has demonstrated an ability to develop formal training courses of great usefulness to banking operations:

1. An accounting course that utilizes scientific teaching machine methods under the supervision of borrowed university professors. The course is given in four 7 hour sessions and is reputed to be the equivalent of one semester of college accounting.[6]

2. Courses have been established at various

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[5]Bank of America, Opportunities for Management Training (San Francisco, 1963), p. 12.

[6]Statement by Ralph E. Boynton, personal interview.

colleges and universities in the state designed to give branch management personnel insight into the problems faced by branch customers. Examples are: a bank designed course in farm management given at the University of California, Berkeley; retailing at University of Southern California; and farm product processing and marketing at California Institute of Technology.

The basic training in all three management training programs concerns commercial banking operations and is from 4 to 9 months duration. This phase of the training could well be formalized, which would have the advantage of a standardization of training, as well as ensuring adequate teaching. It would also present an early opportunity to eliminate trainees that are not of a banking mein through testing techniques, thus reducing the cost of future training. Classroom learning would be reinforced by later experiences in the on-the-job training phase. Human relations training, considered a weakness of the bank's overall training efforts, could be readily interjected into the formal classroom phase.[7] This would simplify administrative problems, consume less time, and allow greater opportunity for trainees to determine career

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[7]Statement by Ralph E. Boynton, personal interview.

patterns. Second, raise management trainees to officer status upon satisfactory completion of the formal phase. This would give them additional status and increased incentive for the on-the-job phase. It would also tend to stabilize the job plans of the trainees. Considering the size of Bank of America, employee retention could be quite a problem. During 1963, 484 of the 3200 promotions from within were to first officer status.[8]

The bank maintains a research staff of about 75, with main areas of interest in EDP methods, communications, bank services, and business services. The staff is headed by a senior vice-president, thus ensuring that top management is kept informed of innovations in the banking field. The graduate schools at Dartmouth, Stanford, Harvard and the University of Washington are utilized for graduate training of selected managers.

While management training, particularily at the lower levels, is quite extensive at Bank of America, it is considered that there are weaknesses in the program that could prove costly and deserve attention:

1. No attempts are made to determine the scope of supervisory activity in order to more closely relate

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[8]Bank of America, Annual Report, 1963 (San Francisco) p. 18.

training job needs. Likewise, no review of job descriptions or supervisory responsibility and authority is conducted. Individual performance records of supervisory personnel are reviewed annually, but not necessarily in connection with proposed training. This is probably a result of feelings in the training department that its members are fully aware of the problems and environment of supervisory personnel, since most of the personnel in this department had previous experience in operating billets.

2. Broad training needs of the organization are presented to the training department in the form of manpower studies which indicate present inventories of personnel and projected plans for personnel requirements. Within the constraints of a training budget, the training department then develops what it considers will fill these needs. Programs are not always instituted with the approval of line management, however, a demonstration of what a new course embodies is usually given to the heirarchy.

This suggests that line management involvement in the training field is restricted to the fringe area and the danger exists that with minimal involvement of line managers training efforts might not fully reflect training needs. However, line managers are involved as in-

structors in formal sessions and in on-the-job training, which should provide some feedback on the effectiveness of training. Nevertheless, there appears a need for greater involvement by the line, particularily in the determination of individual training needs.

As previously mentioned, there is an indication from management that much needs to be done in the field of leadership and human relations training, probably a reflection of the recognition of trends towards less technical training for supervisors, with more emphasis on customer and employee relations. Bank of America has instituted courses primarily concerned with customer relations,[9] but an inventory of topics suggests minor efforts in the area of human and employee relations. This may be the result of an impression of authoritarianism on the part of higher officers at the bank, and is reflected in the bank's system for promotion. In the event of an opening, requirements for the position are programmed into a computer which selects several candidates on the basis of qualifications. The computer selections are then presented to one of seven selection boards which makes the final choice. Little out of the ordinary except, the immediate superior of the selectee

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[9] Cf. ante., pp. 23-24.

is not consulted during the deliberations and takes no part in the decision.

4. Pacific Gas and Electric Company.

P.G. & E. like Bank of America, is the top in its field, being the largest privately owned public utility in the United States. Assets are in excess of 3.5 billion dollars and employees number 19,500. Expansion plans include some 225 million dollars in plants and facilities during 1964, with long range plans for 2.4 billion dollars expended between 1963 and 1980.[1]

A research staff of some 75 persons is currently involved with investigating problems in such diverse fields as engineering techniques, nuclear engineering, electronic data processing and operating procedures. Membership in professional and industrial societies is maintained to add to the influx of new ideas in the industry.

Line and staff personnel attend regularly scheduled workshops designed to discuss current problems and sharpen decision making techniques. In addition, selected managers, mostly engineers, attend college campuses in the state for refresher courses in engineering and management. The 9 month Sloan program at University of California is also utilized for management training.

No formal program exists for a study of supervisory

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[1]Statement by Donald L. Kennady, personal interview.

environment, however, division personnel staff members make informal studies of the problems facing supervisors. These studies are included in requests to the central office training department for inclusion in regularly scheduled training sessions or are used for informal division training sessions. There is no review of job descriptions by training personnel, as this is done during annual wage and salary reviews.

Indications from P.G. & E. management are that the primary need in supervisory training is in the areas of leadership, human relations and decision making techniques. Less emphasis is being placed on technical qualifications as will be pointed out in a discussion of the firm's major training effort for supervisors, i.e., the Supervisor's Training Conference. This course has been in use at P.G.&E. for the past five years and has all the appearances of being highly successful. It was two years in the design phase and presented to management in such a format that a complete description of the course was given in five minute increments. Thus a great deal of thought and preparation were used to help achieve management and supervisory acceptance. In order to avoid a lack of response sometimes met in training situations, it was decided to put attendance on a voluntary basis. P.G.&E. has never lacked for volunteers, the

course is presented to 16-18 supervisors one week each month, with intentions to increase this to twice monthly in the near future. Although not a condition of employment or promotion, it is generally concluded that personnel passed over once or twice have a much better chance at promotion, and are given more consideration after a good performance during the training session. Since much of the program depends on class discussion, the conference begins with a breakfast at a nearby hotel, attended by trainees, instructors, and one or two members of top management. This serves to set trainees at ease and helps develop group interaction as the group is usually a composite from the 13 divisions of the firm. It also helps to create an atmosphere that management is truly interested in their development. The first session is presented by the manager, Personnel Relations and is designed to give trainees an overview of the program and how it fits into organizational objectives. Following this is a two-hour period during which the trainees are broken up into small groups each with a discussion leader. During this session the leaders attempt to ascertain and develop supervisory needs in training, as well as guide the trainees in the establishment of objectives concerned with the training period. This should produce a desirable effect on trainee motivation and improve the

interest level. This week in the life of the supervisor is not to be construed as a vacation as can be seen in table II, which presents a typical day, with course descriptions.

The last day of the session is devoted to an "in-basket" problem. This problem has been developed to summarize all training from previous days. Basically a stress situation, all students are given a package of letters, memos, and other correspondence typical of that which may appear in the in-basket of a company executive. The correspondence concerns several areas: employee relations, customer relations, and problems in production. Some of the correspondence is inter-related, while some pieces supersede others in the pile. If minor items, such as dates or signatures, are overlooked the student may fail to make the desired connection with various sections of the correspondence. Students are given one hour to read, differentiate, and take action based on information contained in the problem. They are required to commit themselves on each separate item. Actual or recommended solutions are then taken up in class discussion. A sample problem with instruction is presented in appendix 1.

The "in-basket" problem appears to be a very good simulation technique that requires student participation

TABLE II

CLASS SCHEDULE - TUESDAY

TIME	TITLE	DESCRIPTION
0815	"Eye of the Beholder"	Attempts to develop perception of others. Uses group labeling techniques, i.e., group is shown a film wherein four persons give their opinions of a fifth. Trainees develop own opinions, then after class discussion are given another film clip that brings out actual personality of the subject.
1000	Company executive	A senior vice-president gives a lecture concerning his specialty in the firm.
1030	Problem solving by the "incident process	This session concerns a case study wherein students attempt to develop critical areas and provide solutions to a problem.
1300	Organization and cooperation	A lecture concerning the firm's organizational structure and problems of inter-unit cooperation. At the end of period class discussion is elicited about current problems in cooperation and recommended solutions.
1445	Company executive	A senior VP, same as 1000 session.
1545	Setting standards of performance	Class discussion on current in-house problems of performance standards. Methods are discussed both from the standpoint of the supervisor and the individual.
1645	Tour - gas control center.	

NOTE - class periods are from beginning time of one session to beginning time of next, except one hour lunch break.

to the utmost, for not only must the trainees take action, but this action must be justified during the discussion period. Trainees are aware that this technique will be used and results evaluated. They are therefore motivated to remember and apply the concepts developed during the earlier part of the course. The problem also requires a look at company operations from other than the supervisory perspective. This helps to develop a greater understanding on the part of the supervisor for the problems that face his immediate superior.

The company president, Mr. R. H. Gerdes, started at P.G.&E. as a lamplighter with little formal education beyond the grade school level. His background as a "self-made" man is reflected in all company training programs. Emphasis is very heavy on self development of the individual and setting the environment to stimulate that self development.

> People develop themselves, and the development of an individual takes place only when there is adequate opportunity around him and desire within him to do so. The plans and programs encompassed in the Management Development Program are aimed at accelerating this individual development process by providing more opportunities for individual growth, and creating the most fertile climate wherein every individual will experience the desire for self-development.[2]

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[2] Management Development Manual, Pacific Gas and Electric Company (mimiographed company publication), p. 4.

The company's program for managerial development encompasses all levels of management from the first line supervisor on up. Basically, it is in three phases:

1. A determination is made of the number of candidates required to fill projected vacancies in the management ranks by the personnel department. Included in this determination are the requisite qualifications for each job.

2. Annual appraisals are made of each supervisor and manager, by immediate superiors. This is done in two separate reports designed to appraise present performance and potential. A determination is then made as to what experience or development is necessary to prepare the individual for the next echelon.

3. Training requirements are then determined from the difference between qualified individuals and number of projected candidates.

Procedures such as this, properly administered, serves several important functions. First, organizational training needs and objectives are developed. Secondly, training requirements are placed on an individual basis and individual development goals are determined. Third, it permits an accurate determination of budget requirements for training purposes. These factors should provide a healthly training climate thus improving

management approval and employee acceptance.

The training budget for supervisory personnel seems austere, considering the company's size, the number of supervisors (2,000 plus), and the number of potential supervisors. The expenses for 1963 totaled $62,400,[3] broken down (table III), the figures and how spent indicate a necessity for careful planning.

Measurement of the tangible results of training is a difficult task in any organization. At P.G.&E several methods are used with accurate records kept by the training department for possible use as selling points for new programs. The methods include:

1. A modified "critical incident" report from the supervisor's senior. Example, supervisors are taught non-directive counseling techniques. While in the process of using this technique with a troubled subordinate, the supervisor is observed by his senior who makes what notes he can and reports his observations to the training department. This type of report has several drawbacks. First, the reporting senior may be unaware of unsympathetic with new techniques, as a result the supervisor's applications of same go unnoticed. Second, seniors may feel that an unsolicited report will just add to the administrative burden so a report is not

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[3] Company report.

TABLE III

ANNUAL BUDGET BREAKDOWN - SUPERVISORY TRAINING

AMOUNT	WHERE	WHAT FOR
$13,500	Management Workshops	Development of skill in decision making techniques, problem solving and supervisory techniques in administration.
$22,400	Supervisor's Conference	Concepts of human relations, leadership, communications and supervisory techniques.
$22,000	Universities and colleges	Technical training in new fields or refresher training in areas of technological interest.
$ 4,500		Miscellaneous and travel expenses.

filed. Third, seniors may be unfamiliar with a new technique and file what amounts to a false or misleading report, thus lowering the reliability of total results.

2. Four to six weeks after the training session a staff member calls on the trainee and his senior to observe the trainee in action and to review briefly some of the subjects undertaken during training. He also solicits a critique of the course from the supervisor, and a critique from the "boss" on any improvements or changes noticed in the supervisors behavior.

3. Probably the most fruitful method of measurement is a company policy which requires division seniors, in conjunction with the individual supervisor, to establish training objectives, the fulfillment of which are reported in regular performance appraisals. This allows not only measurement, but encourages the individual to continue self-development. It also induces the use of newly learned supervisory techniques in actual operations that may otherwise have been forgotten when the individual left the classroom.

Refresher training is accomplished through the medium of management workshops, one day conferences which are held periodically in the divisions. These are primarily problem-solving sessions, but afford the opportunity to

reinforce previous learning by relating concepts or principles to actual problems. A 2 day refresher course which supplements the Supervisors Training Conference is also provided by the training department in the various divisions. Supervisors receive a monthly management magazine and case studies developed by the American Management Association which are worked on in spare time and become part of the individuals self-development program mentioned above.[4] Follow-up to training at P.G.&E. is a fairly thorough process that involves both the line and the staff. Line management helps the individual set goals for self-development, sets the climate and encourages the individual in self-development, and appraises his progress. The staff provides follow-up material and training, assists the line in setting a climate for self-development, and maintains the records of progress.

In retrospect, it would appear that P.G.&E. is able to accomplish a healthy supervisory development program on a rather meager budget. This can be mostly attributed to a considerable effort bent towards encouragement of the individual through individual attention, and the encouragement of a close, continuous relationship between superior and supervisor.

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[4] Cf. ante., p. 34.

5. Conclusions and acknowledgements.

Supervisory personnel occupy a unique position in today's organizational hierarchy, for they must not only be technically competent, but competent in administrative matters and in dealing with other people. They are under pressure from the management which they serve, as well as from the worker than requires the supervisor's attention. It follows then that the development of the supervisor requires special attention. One of the methods of encouraging this development is the training program. The problem does not end with the establishment of a training program, for mere lip service to supervisory development does not accomplish the task. Basically, the problem is one of preparation, for it is only through adequate preparation that management can develop a training program that truly meets the needs of the job, the individual, and the organization. Further, adequate preparation is necessary to set the training climate which enhances supervisory interest, motivation, and retention. It is also necessary to tell management where it has been with supervisory training, where it is going and how it gets there.

Supervisory training should not be construed as a one-time affair, but as a continuing process that takes place not only in a classroom but in the day-to-day interaction between manager and supervisor. In this sense

management must recognize its responsibility to the individual and the organization by encouraging a program of supervisory self-development and by providing the facilities and guidance necessary to that self-development.

A continuing education does not end at the supervisory level but must extend upwards through the hierarchy, a situation which is dictated by rapidly changing conditions in all fields of endeavor. Essential at all levels of continuing education for managers is some underlying background in theory which will provide the continuity and foundation for changing economic and social conditions. These factors will have a considerable effect on the attitudes, aptitudes, and successes of top management which in turn will be reflected in the actions of the supervisor. Thus, training and education for supervisory personnel is not limited to the formal training program, for much is to be learned from the example set by higher management.

Acknowledgements to:

Mr. Ralph E. Boynton
Vice President, Training Department
Bank of America
San Francisco, California

Mr. H. M. McKnight
Manager, Personnel Relations

and

Mr. Donald L. Kennady
Pacific Gas and Electric Company
San Francisco, California

The cooperation and frank discussion of respective company training programs from the above-named gentlemen is greatly appreciated.

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THE IN-BASKET PROBLEM

INSTRUCTIONS

Each person will work this problem independently.

YOUR SITUATION

Assume that you are Sam Conway and that you have just been named Manager of the Elko District of the Nevada Power Company.

The Nevada Power Company's service area is divided into two widely separate and distinct geographic areas. The majority of the Company's activities are centered around Las Vegas, in the southwestern corner of the State, while the Elko District is in the northeastern section. Nevada Power has been growing rapidly due to a series of economic booms and now has approximately 150,000 customers and an annual revenue approaching $18,000,000. Its residential customers lead the Nation in annual usage of power.

Approximately 85% of the Company's 400 employees are located in the Las Vegas area, including the General Office Staff groups. Experienced manpower has been a recurring problem during the recent periods of rapid expansion and on several occasions Nevada Power has turned to other utility companies for key men. Pacific Gas and Electric Company has been a favorite target with the most recent acquisitions being A. J. Swanking (Vice President and General Manager) and Paul Suranskate (Manager of Electric Operations).

The expansion of the Las Vegas area (the original area of operation) was augmented two years ago by the purchase of the Elko Power Company, a small firm servicing the northern Nevada city of Elko and the surrounding area. The Elko area is predominently a cattle production center and is generally considered to be one of the last frontiers in America. Several very large ranches are among the Company's most influential customers.

Following the merger, the Elko area was organized as a separate district of Nevada Power, with boundaries roughly parallel to those of Elko County. Business offices are maintained in Lamoille, Wells and Halleck, in addition to the town of Elko. Due to its geographic isolation, Elko District is not interconnected with the rest of the Company's system. It has three sources of generation; a small hydro plant of its own at Lamoille Canyon, two small diesel units for peaking, and transmission lines connecting it to Idaho Power Company's hydro plants on the nearby Cedar and Salmon Creek systems. A gas distribution system is operated in Elko and it is intended to extend service to Wells and Lamoille as soon as sufficient customers are available. The entire area has been actively developed by R. E. A. advocates, and the District is surrounded by Co-ops and Utility Districts.

Since the merger, HAROLD BENSON, the District Manager, has been emphasizing the consolidation of his organization and the integration of the District into Nevada Power Company. Recently, it was decided to replace Benson with a man from outside the Company. You have been selected from a large number of candidates. Your appointment was to be effective July 1, 1964, with May and June being spent as Benson's assistant. On April 25, Benson suddenly became ill and was flown to a Las Vegas hospital, where he lapsed into a coma. As a result, the effective date of your appointment was moved up to May 1, 1964.

The General Manager has discussed with you the problems involved in strengthening the District's overall efficiency. In particular, he stressed the necessity for a greater degree of decentralization, with the various supervisors assuming a substantially larger degree of responsibility and authority in solving their own problem. It was generally agreed that you should have full authority to proceed at your own discretion.

Through your previous experience in the utility industry, you know a few of the key people in the Elko District. In preparing for your new job you jotted down some short notes on these men. These biographical sketches are attached, along with a partial Company organization chart, a map of the Elko service area, and a calendar.

You arrived yesterday afternoon at Elko and spent the remaining hours of the day becoming acquainted with your new staff and going through the offices. These contacts tended to confirm the biographical notes you had made.

THE PROBLEM

In one hour you must leave for the airport to fly to Los Angeles where you will attend a course for Utility Company Supervisors at U. C. L. A. The course is to last through Saturday afternoon and you will return to the office next Monday, 6 days from today. The attached correspondence is in your in-basket and looks as though it should be handled before you leave.

You are to go through the entire packet of papers and take whatever action you think appropriate. Write down every action you take on each item, including notes to your secretary, to yourself, and to others. Draft or write letters. Write out any plans or agenda for meetings or conferences you would call. Also, record any telephone calls made.

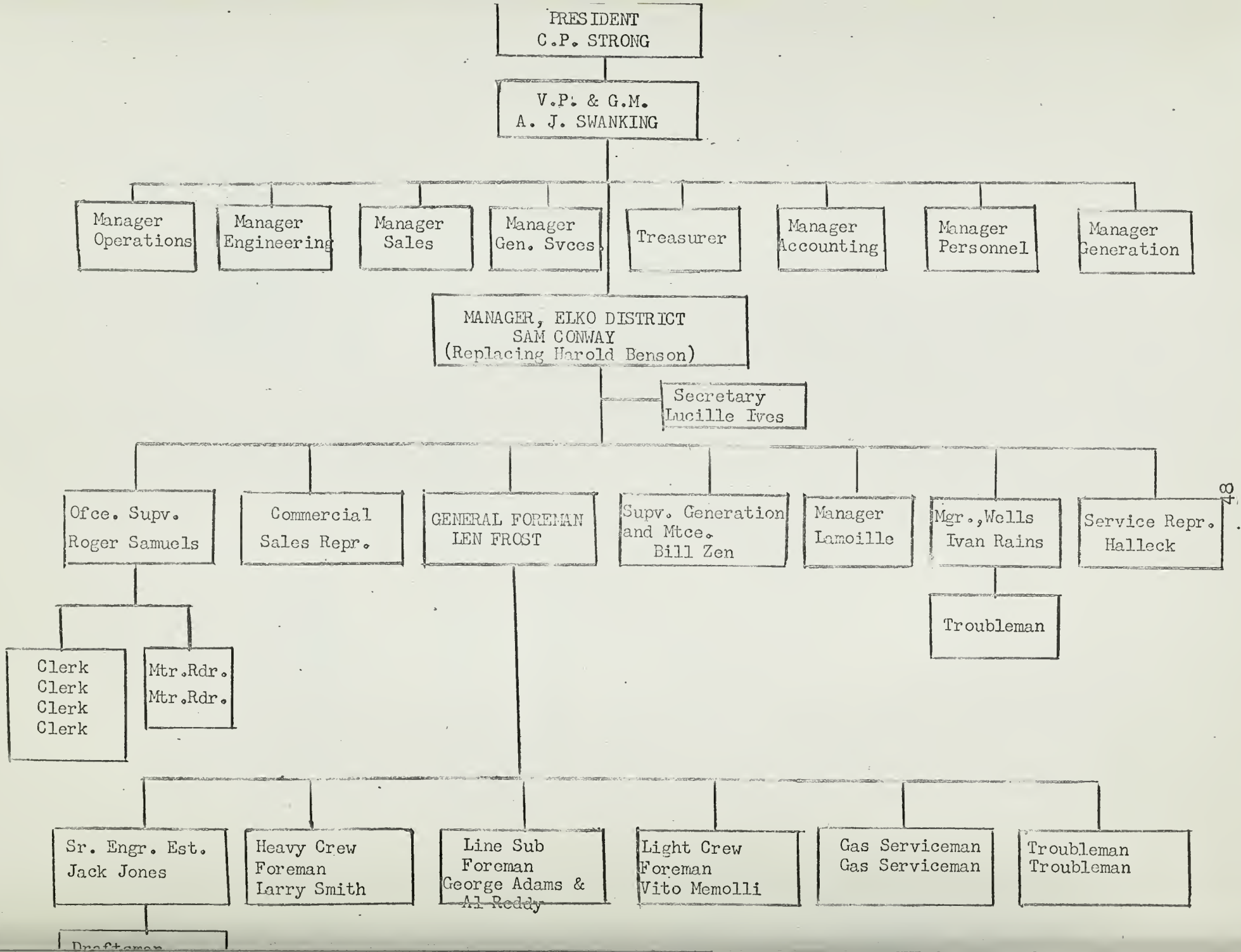
REMEMBER

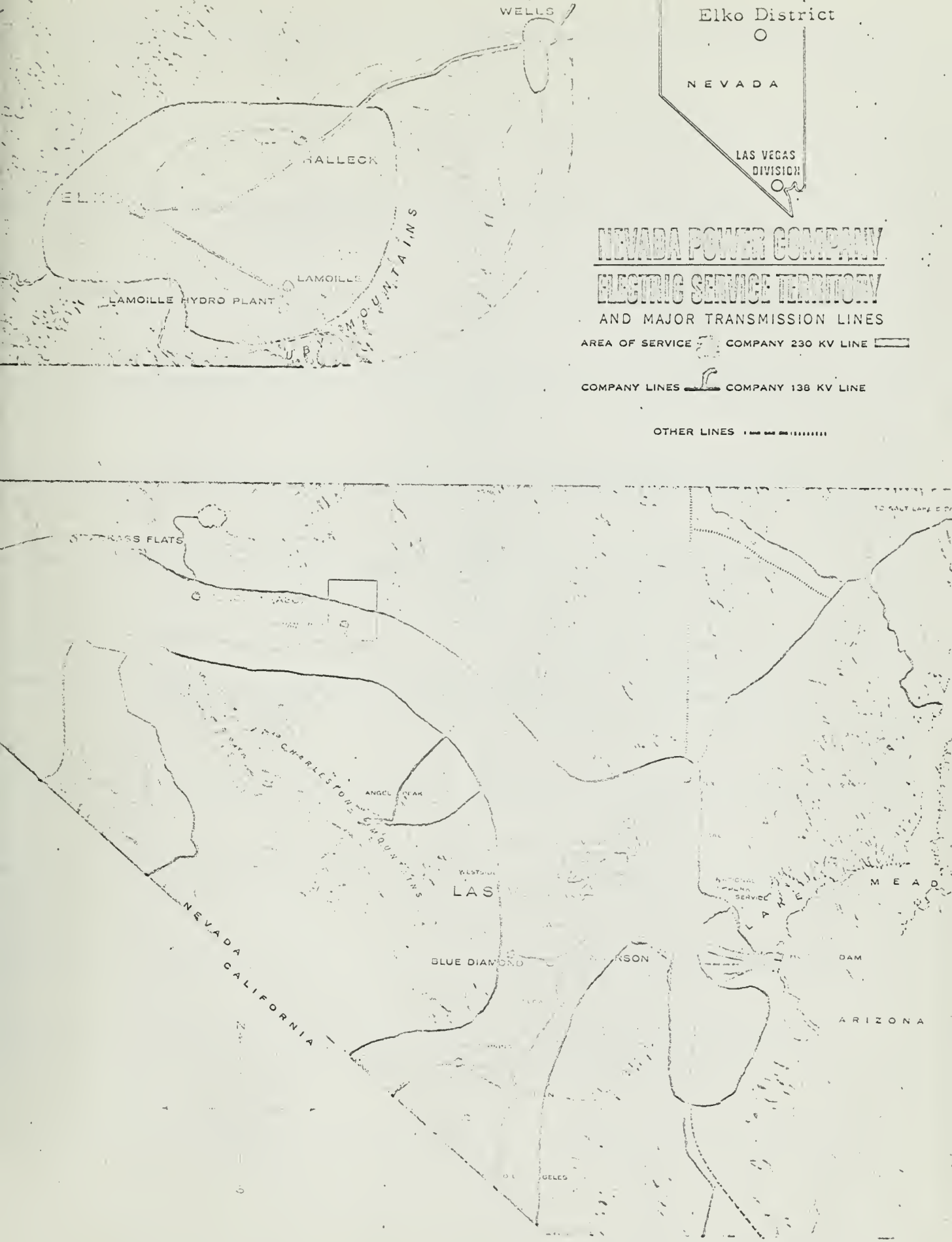
You are Sam Conway, the new Manager of the Elko District of the Nevada Power Company. In one hour, you must leave and you will be gone for six days. It is now 8:15 a.m., Tuesday, May 1. You will return on Monday, May 7. Write out every action you take on each item.

SAM CONWAY'S

NOTES ON ELKO DISTRICT EMPLOYEES

ART HAMBLY Commercial Sales Representative	Makes decisions quickly and easily, doesn't like to think problems through, sometimes jumps to conclusions as result, knows saleswork thoroughly, not interested in other phases of business except as they affect sales.
BILL ZEN Supervisor of Generation and Maintenance	Gruff manner, high work standards for both himself and his people, engineering degree from prominent midwestern university, an old-timer with the Company. He is inclined to be concerned more with the technical aspects of the job rather than his administrative responsibilities.
LEN FROST General Foreman	Apparent work horse, always busy, works long hours, quality of work high but volume low in comparison to time spent. Sometimes late in reports. Last one to arrive at conferences. Has resisted accepting additional responsibility and has indicated that he is not interested in further promotions.
ROGER SAMUELS Office Supervisor	Hesitant, uncertain, takes criticism hard, fears failure, fears being wrong, performance characterized by thoroughness, consistently high quality.
LARRY SMITH Heavy Line Foreman	63 years old, started 39 years ago with Elko Power Company, all experience in overhead line department. Knows line construction well, has been Foreman for last 10 years. Weak on paper work, performs assignments well --- though not agressively.


PRESIDENT
C.P. STRONG
V.P. & G.M.
A. J. SWANKING
Manager Operations
Manager Engineering
Manager Sales
Manager Gen. Svces
Treasurer
Manager Accounting
Manager Personnel
Manager Generation
MANAGER, ELKO DISTRICT
SAM CONWAY
(Replacing Harold Benson)
Secretary
Lucille Ives
Ofce. Supv.
Roger Samuels
Commercial
Sales Repr.
GENERAL FOREMAN
LEN FROST
Supv. Generation and Mtce.
Bill Zen
Manager
Lamoille
Mgr., Wells
Ivan Rains
Service Repr.
Halleck
Troubleman
Clerk
Clerk
Clerk
Clerk
Mtr.Rdr.
Mtr.Rdr.
Sr. Engr. Est.
Jack Jones
Heavy Crew
Foreman
Larry Smith
Line Sub
Foreman
George Adams &
Al Reddy
Light Crew
Foreman
Vito Memolli
Gas Serviceman
Gas Serviceman
Troubleman
Troubleman


WELLS
HALLECK
ELKO
LAMOILLE
LAMOILLE HYDRO PLANT
MOUNTAINS
Elko District
NEVADA
LAS VEGAS DIVISION
NEVADA POWER COMPANY
ELECTRIC SERVICE TERRITORY
AND MAJOR TRANSMISSION LINES
AREA OF SERVICE
COMPANY 230 KV LINE
COMPANY LINES
COMPANY 138 KV LINE
OTHER LINES
MASS FLATS
ANGEL PEAK
LAS
BLUE DIAMOND
NEVADA CALIFORNIA
MEAD
DAM
ARIZONA

A P R I L

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
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22	23	24	25	26	27	28
29	30					

M A Y

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
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20	21	22	23	24	25	26
27	28	29	30	31		

Nevada Power Co.

For Intra-Company Uses

Division or Department: VP & GM
File No.:
Re Letter Of Subject: Management Conference at U.C.L.A.

April 30, 1964

MR. SAM CONWAY:

I know this is a terrible time to send you to a Management Conference but I think that it will be an invaluable aid to you on your new job. Since this four-day program at U.C.L.A. is only given once a year, you can't afford to miss it.

Our Personnel people will be interested in your evaluation of the program when you get back and would like you to submit a written report as soon as possible. They tell me that you won't have much time for sight-seeing since they work you night and day from the time you get there until the time you leave.

I will be attending a convention in Chicago during the week of May 6 - 10. As soon as I return, I'd like to talk to you about how things are going at Elko and to hear your report on the U.C.L.A. class.

Good luck.

A. J. SWANKING
Vice President and General Manager

AJS:sa

PS: - Incidentally, you can rely on your secretary, Lucille Ives, to give you a lot of help. She is intelligent and is very familiar with the operations in the Elko District.

April 30, 1964

Dear Mr. Conway:

I am taking the day off tomorrow. I hope you don't mind. I will be taking care of some things downtown in the afternoon but I expect to be at the dressmaker's all morning. If you need me, you can call me there, the number is DE 7 - 1699.

Lucille

To: Sam Conway

4-30-64 3.

FROM: Art Hambly

Since this is your first visit to Elko in your new role as District Manager, I would like to suggest that I take a few minutes to brief you on the people in our organization.

Looking foward to becoming better aquainted.

53

Art -

April 30, 1964

Manager, Elko District
Nevada Power Company
Elko, Nevada

Dear Sir:

I own and operate a tavern called the Silver Saddle in Halleck. Your gas crew has been having coffee in my place for several weeks. Each day they seem to stay longer. Today they took up four stools for one and a half hours and only bought coffee.

I can't make any money this way. Can you please do something about this?

Very truly yours,

Sam Vale

SAM VALE

Mr. Conway -

Sorry to bother you with this but urgent action is required.

Lucille

April 30, 1964

55

ACTION MEMO

To: Harold Benson

From: Vice President, Operations

Re: Attached memorandum from Jack Newberry

We'd better look into this. Will you get me the necessary information for our May 5th meeting?

April 24, 1964

ACTION MEMO

To: Vice President, Operations

From: Jack Newberry
(Special Assistant to the President)

I happened to run into Stu Flood of the Warm Springs Ranch at the last Pacific Coast Electrical Association meeting. During the conversation he mentioned hopes that line extension delays could be ironed out in the near future.

This might be something we should act on, considering who Flood is.

April 23, 1964

Nevada Power Co.

For Intra-Company Uses

Division or Department: GENERATION AND MAINTENANCE
File No.
Re Letter Of
Subject: Sam Hinman, Electrical Technician

April 30, 1964

MR. SAM CONWAY:

Last Friday we asked Sam Hinman, our Electrical Technician, to report for overtime work on Saturday because of an emergency overhaul. He told me that he would not come in and further said that he didn't need to give any reason for his refusal.

On Saturday he did not report for work. This morning I personally discussed his failure to report for work on Saturday with him. He again refused to offer any excuse or explanation.

What action do you recommend?

Bill Zen

BILL ZEN, Supervisor
Maintenance and Generation

BZ:e

April 29, 1964

Mr. Conway:

Maybe you can help me. As you probably know, I bid in from Las Vegas to the Light Crew Foreman's job, here in Elko. I like the job very much, but I am having trouble getting the crew to accept me. Joe Olson, my welder, is still pretty unhappy over being-by-passed. The other guys on the crew seem to resent me, too.

I don't know what to do about it. Do you have any ideas on what I should do?

Vito Memoli

75

80-129 [redacted]
Confidential

Date April 15, 1964

EMPLOYEE DEVELOPMENT WORKSHEET
CLASSIFIED EMPLOYEES

NAME JOE OLSON CLASSIFICATION WELDER LOCATION ELKO

INSTRUCTIONS: Please check the one statement which most accurately describes employee's current performance. Each trait has three possible answers. Check only one of those answers for each trait listed. Use notes to comment for clarity.

GENERAL REQUIREMENTS

				NOTES
KNOWLEDGE OF WORK: Understanding of job duties and procedures.	☐ Needs considerable instruction	☐ Needs occasional instruction	☒ Knowledge at a very high level	Has 20 years in Gas - all at Elko.
QUANTITY OF WORK: Volume of work based on highest standards.	☐ Should increase output	☐ Puts out average amount of work	☒ Volume at desirable level used to be	Understand he used to get out a lot of work.
QUALITY OF WORK: Accuracy and thoroughness, compared to highest standards.	☐ Needs improvement	☒ Usually accurate and thorough	☐ Maintains highest standards	
PLANNING OR LAYING OUT WORK: Ability to make most effective use of time and materials.	☐ Needs constant assistance	☒ Fairly effective, needs occasional assistance	☐ Very systematic and effective	Okay for himself, but has trouble laying out job for crew.
SAFETY HABITS: Carefulness with self and others. Is employee a safe worker?	☐ Does not observe proper precautions	☐ Usually careful and alert	☒ Careful, good safety habits	

PERSONAL CHARACTERISTICS

ABILITY TO LEARN: Ability to grasp new ideas and procedures.	☐ Very slow to learn	☐ Takes more time than normal to absorb instructions	☐ Learns rapidly, good comprehension	Have not observed.
INITIATIVE: Resourcefulness, independent thinking, attention and application to work.	☒ Needs constant supervision and direction	☐ Steady and willing worker	☐ Goes ahead on own whenever possible, energetic and resourceful	Has been sullen since I got here. Won't do anything on his own.
STABILITY OF TEMPERAMENT: Poise, self-control, ability to retain emotional balance.	☒ Unpredictable at times, immature	☐ Occasionally loses poise	☐ Well-balanced, mature	Flares up easily.
ATTITUDE: Feelings about job. Conscientiousness.	☒ No team spirit, uninterested in work	☐ Fair interest, occasionally lacks enthusiasm	☐ Cooperative and enthusiastic, interested in work	
ORAL EXPRESSION: Expressing himself orally to others.	☐ Needs considerable training	☒ Has some difficulty expressing ideas	☐ Expresses ideas with clarity	
WRITTEN EXPRESSION: Expressing himself to others in writing. (If required by job duties or employee is a Journeyman)	☒ Needs considerable training	☐ Needs some training	☐ Satisfactory, good presentation	
IMPRESSION ON OTHERS: Effectiveness in meeting and dealing with other employees and/or the public.	☐ Frequently creates an unfavorable impression	☒ Gets along well under normal circumstances	☐ Always makes a good impression	
LEADERSHIP: Ability to command respect and obtain results through teamwork.	☐ Unable to lead	☒ Some qualities	☐ A leader	
APPEARANCE: Personal neatness.	☐ Careless with dress and personal neatness	☐ Acceptable for work assignment	☒ Always neat and well-groomed	

1385:

(Do not leave blank. If "none", say so)

Strong points which should be recognized, and possibly utilized more fully. Very good welder

Areas needing development. Reading and writing.

Would you place on present job? Yes Comment. Good welder

Would you recommend for promotion? If he could handle Standard Practices and estimates. Is employee ready now? No

If yes, what job or jobs?

Explain your answer on employee's potential. Can't handle paper work.

Check and/or insert specific plans discussed with the individual for his development.

WHAT EMPLOYEE COULD DO

1. Educational courses and development activities. Cite specific examples.

( ) Don't know what is available.

2. Attempt to improve attitude toward:
( ) Initiative and knowledge
( ) Safety
( ) Quantity and quality
( ) Cooperation
( ) Public Relations
( ) (Other) _____

THINGS SUPERVISOR SHOULD DO OR RECOMMEND WHEN AND WHERE APPROPRIATE CITE SPECIFIC EXAMPLES.

1. ( ) Special assignments, or relief or rotational work.
( ) Special training on job.
( ) Arrange transfer to more suitable work.
( ) Follow-up appraisal in _____ months.
( ) Make an effort to instill interest in areas needing improvement.
( ) (Other) _____

Immediate Supervisor... Vito Morelli ...Date... April 15, 1964...

Reviewed by next level Supervisor.....Date.....
(To be completed before employee discussion)

Employee Discussion:

Discussed with employee on.....Date.....By.....Immediate Supervisor

1st Review:

2nd Review:

INITIAL AND DATE

Immediate Supervisor	Supervisor	District Supervisor	Manager	District Manager	Division Dept. Head	Division Personnel

8A

April 27, 1964

MR. CONWAY:

PLEASE CLEAR THIS UP IMMEDIATELY.

C P Strang

WELLS VALLEY RANCHES, INC.
Wells, Nevada

April 26, 1964

AIR MAIL
SPECIAL DELIVERY

Mr. C. P. Strong, President
Nevada Power Company
Las Vegas, Nevada

Dear Mr. Strong:

Last week my son wrote your District Manager about the outrageous behavior of one of your employees. As yet, he has received no reply. I am reluctant to write you but feel that something must be done to relieve this intolerable situation.

Sincerely yours,

Larry Spaulding

LARRY SPAULDING
President
Wells Valley Ranches, Inc.

LS:e

April 27, 1964

MR. CONWAY:

I realize it isn't quite fair to put you on the spot; but due to my personal problems, I feel I must discuss my situation with you immediately.

I haven't understood the engineering setup here from the start. It seems that none of the estimates or designs I prepare are followed. Furthermore, they never tell me when they change my estimates in the field.

I like my work in Elko very much and feel that I would like to make a career with the Company. However, I have been thinking a little about engineering jobs with other firms. In fact, Lockheed has offered me a position in San Jose, California and I have to make a decision next week. Although my wife's family is here in Elko, the offer is going to be hard to turn down.

Can I talk to you?

Jack Jones

JACK JONES
Senior Engineering Estimator

JJ:e

MEMO

April 27, 1964

To: MR. SAM CONWAY

From: MR. ROGER SAMUELS,
Office Supervisor

I just told Lucile Ives that she could take the day off on Tuesday of next week. She needed an answer right now so I told her it was okay. It had something to do with her wedding plans. Lucille is finally going to get married. She is engaged to an older fellow and they are scheduled to get married at the end of May. Lucile has postponed the wedding a couple of times because we were so busy here and I think her intended husband is getting impatient.

Hope this doesn't inconvenience you too much.

Roger Samuels

For your action -

Lucille

NEVADA POWER CO.

11 B

JOB BID OR TRANSFER APPLICATION QUESTIONNAIRE

TRUCTIONS:
PREPARE IN TRIPLICATE.
PART I TO BE FILLED OUT BY THE DEPARTMENT OR DIVISION TO WHICH THE EMPLOYEE HAS INDICATED A DESIRE TO TRANSFER OR IN WHICH THE VACANT JOB IS LOCATED.
PART II TO BE FILLED OUT BY A SUPERVISOR IN THE DEPARTMENT OR DIVISION WHERE THE EMPLOYEE IS CURRENTLY EMPLOYED.

PART I

HAROLD BENSON, DISTRICT MANAGER _____ DATE APRIL 26, 1964
(G.O.DEPT.HEAD OR DIV.MGR.)

GEORGE ADAMS _____ (HAS BID ON A JOB VACANCY IN) (CROSS OUT ONE.) LAS VEGAS
(NAME OF EMPLOYEE) (DEPARTMENT OR DIVISION)

RE CONSIDERING THIS EMPLOYEE FOR A LINEMAN _____, _____ IN THE
(JOB CLASSIFICATION) (JOB VACANCY NO.)

ctric Overhead Dept., Las Vegas DEPARTMENT. THE DUTIES CONSIST OF: _____
(LIST DUTIES AND SPECIAL REQUIREMENTS IF NO

EFINITION)

RDER THAT WE MAY GIVE PROPER CONSIDERATION TO THE ABOVE. WILL YOU PLEASE ANSWER THE FOLLOWING
TIONS:

A. F. Cartwright, Personnel Manager, Las Vegas
(REQUESTED BY) (ADDRESS)

PART II

	YES	NO
DOES EMPLOYEE HAVE A FULL KNOWLEDGE OF PRESENT JOB?		
IS EMPLOYEE A GOOD WORKER?		
DOES EMPLOYEE GET ALONG WELL WITH OTHERS?		
IS EMPLOYEE FREE FROM PHYSICAL HANDICAPS?		
WOULD YOU BE WILLING TO ACCEPT HIM BACK INTO YOUR DEPT. OR DIV.?		
DOES EMPLOYEE HAVE SAFE WORKING HABITS?		

WHAT IS EMPLOYEE'S BIRTH DATE? _____
WHAT IS EMPLOYEE'S EDUCATION? _____
WHAT IS EMPLOYEE'S PRESENT CLASSIFICATION AND WAGE RATE? _____
WHAT IS:

A. EMPLOYEE'S COMPANY SERVICE DATE? _____
B. EMPLOYEE'S CLASSIFICATION SENIORITY DATE? _____
C. DATE EMPLOYEE REACHED TOP OF PRESENT CLASSIFICATION _____
D. EMPLOYEE'S DEPARTMENT AND SUBDEPARTMENT _____

DO YOU CONSIDER THIS EMPLOYEE QUALIFIED TO PERFORM THE DUTIES EXPLAINED IN PART I? _____ (YES) _____ (NO) EXPLAIN_

SE RETURN THIS QUESTIONNAIRE IN SEALED.
LOPE MARKED CONFIDENTIAL _____
(PREPARED BY) (DATE)

RIBUTION:

DEPARTMENT OR DIVISION PREPARING PART I

☐ SEND 3 COPIES TO DEPARTMENT OR DIVISION IN WHICH EMPLOYEE IS CURRENTLY EMPLOYED.

DEPARTMENT OR DIVISION PREPARING PART II

☐ DEPARTMENT OR DIVISION REQUESTING INFORMATION
☐ GENERAL OFFICE PERSONNEL DEPARTMENT
☐ EMPLOYEE'S DIVISION PERSONNEL FILE.

Nevada Power Company

For Intra-Company Uses

Division or Department: PERSONNEL
File No.:
Re Letter Of:
Subject: Jack Jones, Senior Estimator

April 26, 1964

MR. SAM CONWAY:

I enjoyed seeing you again this morning. As I told you before, all of us are very pleased to have you join our Company. I'm sure that it will be mutually profitable.

One thing I forgot to mention is the help we are going to need from you in developing one of the most promising young engineers to ever come into Nevada Power. His name is Jack Jones, and he is presently assigned to Elko as a Sr. Estimator. He is a young (23 years old) college graduate in Electrical Engineering from the University of California. He was hired here about a year and a half ago and was transferred to Elko last June for field experience. He is intelligent, aggressive and has a very strong interest in engineering. He showed very good promise in our Engineering and Electric Operations Departments, though still green and a trifle headstrong.

We'd like to have a report from you on August 1st regarding the experience he has had at Elko, his performance and your opinion of his potential.

A. F. CARTWRIGHT
Personnel Manager

HFC:sa

cc: Vice President & General Manager
Vice President, Operations
Manager, Electric Operations
Manager, Engineering

Nevada Power Co.

For Intra-Company Uses

Division or Department: General Office
Vice President of Operations
File No.: 850.8
Re Letter Of Subject: GO 95 Infractions

April 24, 1964

MR. HAROLD BENSON:
District Manager, Elko

In confirmation of our discussion last week, I want to repeat again that during the last 12 months 120 infractions of GO 95 have occurred on the Elko County distribution lines. This situation cannot be allowed to continue.

Please send me a report not later than May 7 that will outline, in detail, your program to accomplish immediately the following:

1. Prevent similar infractions in the future.

2. Correct existing infractions.

H. P. BRUIN
Vice President, Operations

HPB:sa

cc: Manager, Electric Operations
Manager, Engineering

Mr. Conway -

For your action —

Lucille

70

April 4, 1964

Mr. Benson:

Something has to be done about this three-man crew situation. Sometimes I wonder why I ever accepted this job as Line Sub Foreman. You hold me responsible for productivity, but the men you send me aren't any good. The guys who pass the test you give think they are too smart to work. The ones who would make good linemen, the good physical workers, all flunk.

On a three-man crew each man has to carry his own weight. I can't be held responsible for getting the work done if the other men on the crew aren't good workers. How can you supervise other people or train them when you are up on a pole working? Something has to be done about this. I bid back into a lineman's job in Las Vegas. If some action is taken on this before Friday, May 5, you can cancel this bid. If not, please process it.

George Adams
LINE Sub Foreman

City of Elko
OFFICE OF THE MAYOR
1124 PUBLIC BUILDING
ELKO, NEVADA

April 24, 1964

Mr. Harold Benson
Elko District
Nevada Power Company
Elko, Nevada

Dear Harold:

Just a reminder that we will be needing those proposals for your expanded parking area at the Planning Commission meeting on Tuesday, May 8th.

I know your people understand our interest in keeping down congestion in the central business district and off First Avenue, so we are looking forward to seeing what you came up with.

Perhaps we can have lunch after the meeting if you have time.

Sincerely,

A. L. GRIMELY
Mayor

Nevada Power Co.

For Intra-Company Uses

Division or Department
File No.
Re Letter Of
Subject Don Spears, Troubleman

April 24, 1964

MR. HAROLD BENSON:

We have a problem with Don Spears again. He has worked in several towns of this Company and has been in trouble in each of them for being absent from work without notification, and for drinking while off-duty to the point where he is unable to work the following day.

On April 2, 1964, he failed to report for work or to notify anyone that he would be unable to work. On April 4, 1964, Mr. Spears was told that this behavior would not be tolerated and that the next incident would be dealt with stringently.

At 4:40 a.m. on April 23, it was necessary to call out Mr. Spears due to a pole fire. He did not answer his telephone so I went to his apartment to call him. Mr. Spears' condition was such that it was not possible to wake him. For that reason, I took the keys to his trouble wagon, which he had at his home. I had to call Elko and have a troubleman sent out to do the work.

At 5:45 a.m. I called on Mr. Spears. He admitted he had been drinking the previous evening but did not consider himself to be drunk. I told Mr. Spears that I did not consider him able to perform his duties and that I had taken the keys to his trouble wagon.

Mr. Spears did not report for work at 8:00 a.m. so I went to his home at 8:30 and found him asleep but did not waken him. I returned to Mr. Spears' apartment again at 2:00 p.m. on the 23rd and found him up and partially dressed. I told Mr. Spears that he was laid off.

What should I do now?

Ivan Rains

IVAN RAINS
Manager, Wells

IR:s

Mr. Conway—

Harold Benson usually handles these personally—

Lucille

NEVADA POWER COMPANY
SUPERVISOR'S EMPLOYEE PROGRESS REPORT

Part I

FRANK J. LOES — Name of Employee — First Report Date 1-3-64 (2 mos. after empl.)

November 3, 1963 — Date Employed — Second Report Date 4-3-64 (5 mos. after empl.)

Part II

4-23-64 — Date

Mr. LEN FROST — Dept. Head or Gen. Supervisor

Electric — Department - Location

Please have the immediate Supervisor interview and report on the above employee who has completed 5 months service and is now employed as a Truck Driver in your Department.

1. How would you class him as a workman?
   Outstanding ☐ Good ☐ Gets By ☒ Unsatisfactory ☐
   Remarks: Work is all right, but he takes too much time off and is frequently late.
2. To what extent does he cooperate?
   To the Utmost ☐ Willing Teamworker ☒ Doesn't Always Respond ☐
   Remarks:
3. Does he show reasonable improvement? Yes ☐ No ☒
   Remarks: I have talked to him about his attendance, but he continues to be late
4. Is he fitted for the kind of work he is doing? Yes ☒ No ☐
   Remarks: Has a sincere interest in the Company, a loyal employee
5. Does he like this type of work? Yes ☒ No ☐
   Remarks:
6. Would you re-employ him if he left your crew or department? Yes ☐ No ☒
   Remarks: Can't depend on his being on the job.
7. Does the employee have safe working habits? Yes ☒ No ☐
   Remarks:
8. Talk to the employee about his progress. Indicate subjects discussed and his reaction: Loes argues that he hasn't been late too often and that he always has a good reason.

Date of Interview 4-23-64 — Return to Harold Benson

George Adams — Immediate Supervisor — Dept. Head or Gen. Supervisor

Part III

(To be completed by Personnel Manager or Supervisor or employee responsible for processing the report)

Remarks and Conclusions:

Signed

Nevada Power Co.

For Intra-Company Uses

Division or Department: ACCOUNTING
File No.: 984.12
Re Letter Of Subject: Discrepancy in Material - W.O. 1-1900X

April 20, 1964

MR. HAROLD BENSON:
Manager,
Elko District

On W. O. 1-1900X (Elko), a notation was made by the Foreman that an anchor guy (1-AG) was installed.

Inasmuch as no anchors were called for on the original estimate and it is not apparent where such anchor guy was installed, will you please advise:

1. If the anchor guy was installed on W.O. 1-1900X, and

2. At what location it was installed.

We also note considerable variation in wire used compared to the original estimate, but notes by Foreman satisfactorily explain this.

The Foreman's notes fail to mention the installation of the 30-[illegible] pole, but requisitions and lack of change in the sketch indicate the 30-foot pole was used.

Prompt reply regarding the anchor guy will be appreciated so that our records regarding this W.O. can be closed.

R. D. LUCER
Manager, Accounting

RDL/a

Estimate for Appropriation
Work Order

DEPARTMENT ELECTRIC DIVISION

ES OF APPLICANTS LOCAL EST. NO.

SCHED.	LIGHT'G.	REFRIGS.	RANGES (KW & OVER)	W. HTR. (30 GAL.)	HEAT'G. KW - MBTU	DOM. WTR. SYSTEMS	STR. LTS. OR INS.	AGR. HTG. KW	POWER LOAD (HP) FIRST 5	POWER LOAD (HP) OVER 5	EAR
D-6	(CSTMRS.) 1	1	1	1	10.						
	(KW)										

LINE EXTENSION DATA

TOT. LTH. EXT. FT. 40

CO. ALLOW. FT.

EXCESS LINE FT.

ADVANCE REQD. $

AT $ PER FT.

EST. 1 YR. REV. $

R

GES

AND LOCATION

tall facilities to serve new customer, Elko.

SITY FOR PROPOSED WORK AND DESCRIPTION THEREOF:

serve applicant, install 15 KVA transformer, 1-30' pole and 1 span 3-1/0 W.P. Sec., service meter.

MMENDATION: Co. Exp. Rule 15 - Tree ext. area BUDGET ITEM J. P. APPL. NO.

ESTIMATOR D. & C. NOS.

. & D.	ACCOUNT NUMBER	ESTIMATE OF COST -- ITEMS (FOR INVOLVED ESTIMATES GIVE SUMMARY HERE—DETAIL ON EXTRA SHEETS	UNIT COST	AMOUNT (DOLLARS ONLY)	TOTAL (DOLLARS ONL
	204	1-30' pole			
	205	125 Ft. #1/0 WPAA Sec			
		6 - Single Point Racks			
		1 - G & M			

PLANT TO BE REMOVED OR ABANDONED.

TOTAL (EXCL. MAINT. AND OPER.)	$
OVERHEAD CONSTRUCTION COSTS ___%	$
APPROPRIATION (EXCL. MAINT. & OPER.)	$
MAINTENANCE AND OPERATION	$
AMOUNT AUTHORIZED	$
REVOLVING STOCK EQUIPMENT (NET) AND SERVICES INSTALLED	$
DEDUCT SALVAGE AND/OR OTHER CREDITS	$
NET AMOUNT	$

DIVISION OR ORIGINATING OFFICE

RECOMMENDED	APPROVED

ENSION BASIS AUTHORIZED:

CHECK LIST	REQ'D.	SEC'D.	CHECK LIST	REQ'D.	SEC'D.
J. P. INTENTION			TEL. PAR'L. PERMIT		
CITY OR CO. PERMIT			R. R. X-ING PERMIT		
TREE TRIMMING			OTHER PERMITS		
HIWAY PERMIT			MACHINE TRENCH—FT.		
RIGHT OF WAY			PAVEMENT—SQ. FT.		

GENERAL OFFICE

W. O. NO. 1-1900X

RECOMMENDED	AUTHORIZED:
APPROVED	GENERAL MANAG

G. M. Dist. Appr.

77

62-6251 (6-62 REV.) 20

NEVADA POWER CO.

JOB BID OR TRANSFER APPLICATION QUESTIONNAIRE

TRUCTIONS:

PREPARE IN TRIPLICATE.

PART I TO BE FILLED OUT BY THE DEPARTMENT OR DIVISION TO ... JOB THE EMPLOYEE HAS INDICATED A DESIRE TO TRANSFER OR IN WHICH THE VACANT JOB IS LOCATED.

PART II TO BE FILLED OUT BY A SUPERVISOR IN THE DEPARTMENT OR DIVISION WHERE THE EMPLOY... IS CURRENTLY EMPLOYED.

PART I

HAROLD BENSON _____ DATE APRIL 20, 1964
(G.O.DEPT.HEAD OR DIV.MGR.)

FRANK J. LOBS (CROSS OUT ONE: [illegible]) (HAS APPLIED FOR A TRANSFER TO) LAS VEGAS
(NAME OF EMPLOYEE) (DEPARTMENT OR DIVISION)

RE CONSIDERING THIS EMPLOYEE FOR A TRUCK DRIVER (JOB CLASSIFICATION), _____ (JOB VACANCY NO.) IN THE

CTRIC O.M. DEPT., LAS VEGAS DEPARTMENT. THE DUTIES CONSIST OF: _____
(LIST DUTIES AND SPECIAL REQUIREMENTS IF NO

EFINITION)

RDER THAT WE MAY GIVE PROPER CONSIDERATION TO THE ABOVE, ... YOU PLEASE ANSWER THE FOLLOWING

TIONS:

A. F. CARTWRIGHT, PERSONNEL MANAGER, LAS VEGAS
(REQUESTED BY) (ADDRESS)

PART II

	YES	NO
DOES EMPLOYEE HAVE A FULL KNOWLEDGE OF PRESENT JOB?		
IS EMPLOYEE A GOOD WORKER?		
DOES EMPLOYEE GET ALONG WELL WITH OTHERS?		
IS EMPLOYEE FREE FROM PHYSICAL HANDICAPS?		
WOULD YOU BE WILLING TO ACCEPT HIM BACK INTO YOUR DEPT. OR DIV.?		
DOES EMPLOYEE HAVE SAFE WORKING HABITS?		

WHAT IS EMPLOYEE'S BIRTH DATE? _____

WHAT IS EMPLOYEE'S EDUCATION? _____

WHAT IS EMPLOYEE'S PRESENT CLASSIFICATION AND WAGE RATE? _____

WHAT IS:

A. EMPLOYEE'S COMPANY SERVICE DATE? _____

B. EMPLOYEE'S CLASSIFICATION SENIORITY DATE? _____

C. DATE EMPLOYEE REACHED TOP OF PRESENT CLASSIFICATION _____

D. EMPLOYEE'S DEPARTMENT AND SUBDEPARTMENT _____

DO YOU CONSIDER THIS EMPLOYEE QUALIFIED TO PERFORM THE DUTIES EXPLAINED IN PART I? _____ (YES) _____ (NO) EXPLAIN_

BE RETURN THIS QUEST...NNAIRE IN SEALED.

LOPE MARKED CONFIDENTIAL _____ (PREPARED BY) _____ (DATE)

RIBUTION:

DEPARTMENT OR DIVIS...N PREPARING PART I

☐ SEND 3 COPIES TO DEPARTMENT OR DIVISION IN WHICH EMPLOYEE IS CURRENTLY EMPLOYED.

DEPARTMENT OR DIVISION PREPARING PART II

☐ DEPARTMENT OR DIVISION REQUESTING INFORMATION

☐ GENERAL OFFICE PERSONNEL DEPARTMENT

☐ EMPLOYEE'S DIVISION PERSONNEL FILE.

62-41708 (REV. 3/61) 50 PADS

April 12, 1964 20

Mr. Benson:

Jim Frost just told me that we're supposed to have a blueprint showing every little thing we build. I asked him why and he said it wasn't his idea. I tried to explain to him that Jack Jones is a real nice boy, but he just doesn't understand line construction. He keeps making up estimates that aren't realistic. I've been correcting his work, as we put the jobs in, but I don't have time to change all of his paper work.

I know you'll go along with me on this.

Jerry Smith

635 Washington Street
Elko, Nevada

April 6, 1964

Mr. Harold Benson
Manager, Elko District
Nevada Power Company
Elko, Nevada

Dear Mr. Benson:

I have a very difficult, personal problem in which your Company is involved. My wife is a clerk in your Elko office. We have been very happily married for two years. Yesterday I learned that another clerk at Elko named Jim Wilson has been taking her out after work. Some evenings she doesn't get home until very late.

Please have him leave my wife alone.

Sincerely,

Tom Spaulding Jr.

Nevada Power Co.

For Intra-Company Uses

Division or Department VP & GM
File No.
Re Letter Of
Subject R. E. A.

April 3, 1964

MR. HAROLD BENSON:

Our attempts to obtain a Court restraining order to prevent the Warm Creek Electrical Co-op from duplicating and paralleling Company lines in Wells Valley, part of our certified area, have been unsuccessful. We are appealing to the State Supreme Court.

An act to amend [illegible] statutes by giving the Nevada State Public Service Commission jurisdiction over electric co-operatives is before the State Legislature. If it is enacted, it will prevent future duplication of facilities by public utilities and co-operatives.

As you know, we weren't able to do anything about the $4,000,000 loan the Co-op secured from the Rural Electrification Administration at 2% interest. We haven't been able to stop them from duplicating Company lines which were already there, although not yet complete to Wells Valley.

We can't expect to win this fight without the support of the local people in Elko County. The only way we can compete with these subsidized co-ops is to be more aggressive and give better service than they do. We simply have to complete our Wells Valley line.

We are doing everything we can at this end but it isn't enough. What happens at the local level may well determine the outcome of this situation. We are depending on you to handle this. I will expect an outline of your plan of action to combat the problem locally, no later than Friday, May 5th.

A. J. SMITH KING
Vice President and General Manager

AJS: sa

When you have completed the items in your in-basket:

1. List any other action you would take not involved with correspondence.

2. List the major problem area that you face as new District Manager and give your tentative thoughts on how you would handle the situation.

thesB68
Supervisory development through training
3 2768 002 07494 0
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